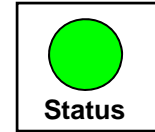




CUSTOMER SERVICES AND SUPPORT DASHBOARD

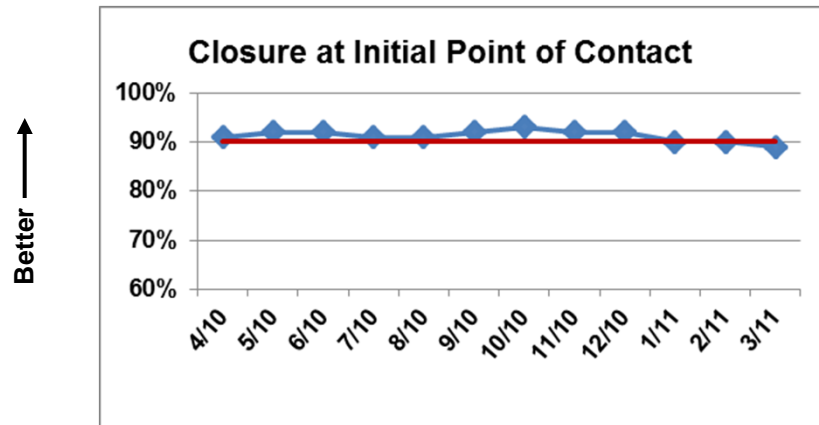


STRATEGIC GOALS

VI. Administer pension benefit services in a customer oriented and cost-effective manner.

MEASURE:

Percent of telephone inquiries closed at initial point of contact.



Closure at Initial Point of Contact – *Employer Inquiries*

Target: 90% effective Jan. 2009

Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2010/11	91%	91%	92%	93%	92%	92%	90%	90%	89%			
2009/10	92%	92%	92%	93%	91%	93%	90%	91%	91%	91%	92%	92%
2008/09	85%	83%	85%	89%	87%	87%	86%	88%	88%	88%	88%	89%

COMMENTS:

- This dashboard continues to be green.
- Staff continue to meet the initial contact closure rate target.

ATTACHMENT B-1ER

3rd Quarter 2010-11

Legend:



= On target or trending to target



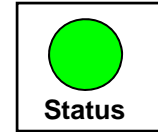
= Need to watch trend



= Senior management attention



CUSTOMER SERVICES AND SUPPORT DASHBOARD



STRATEGIC GOALS

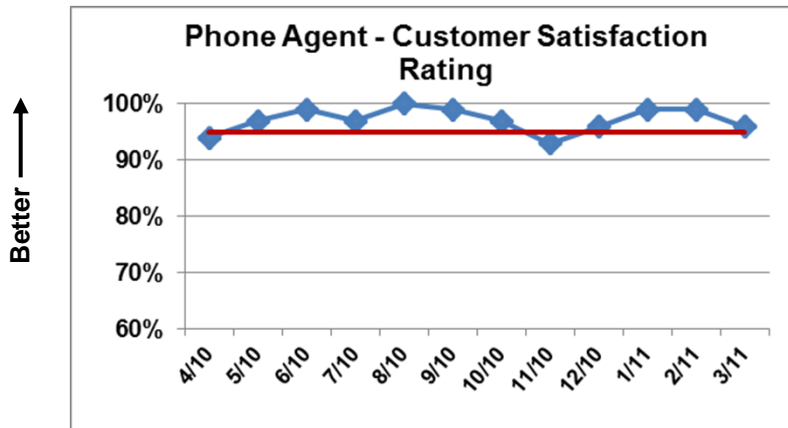
V. Provide sustainable pension benefit products and services responsive to and valued by members, employers and stakeholders.

MEASURE:

Customer satisfaction rating for phone agent services.

Phone Agent Customer Satisfaction Rating – *Employer Inquiries*

Target: 95%



Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2010/11	97%	100%	99%	97%	93%	96%	99%	99%	96%			
2009/10	95%	99%	96%	96%	94%	94%	94%	93%	95%	94%	97%	99%
2008/09	89%	91%	95%	93%	93%	92%	N/A	N/A	96%	96%	95%	97%

COMMENTS:

- This dashboard continues to be green.
- Staff exceeded the phone agent customer satisfaction rating during the 3rd quarter.

ATTACHMENT B-2ER

3rd Quarter 2010-11

Legend:



= On target or trending to target



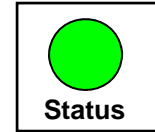
= Need to watch trend



= Senior management attention



CUSTOMER SERVICES AND SUPPORT DASHBOARD



STRATEGIC GOALS

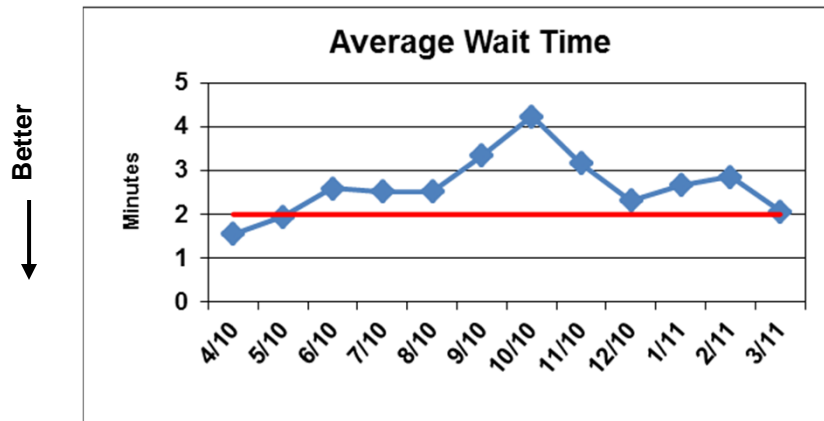
VI. Administer pension benefit services in a customer oriented and cost-effective manner.

MEASURE:

The length of time the callers wait for an agent after leaving the Interactive Voice Response (IVR) system and entering the queue.

Average Wait Time – Employer Inquiries

Target: *Monthly average of under 2 minutes.*



Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2010/11	2:31	2:31	3:21	4:14	3:10	2:19	2:40	2:52	2:04			
2009/10	1:22	1:36	1:50	2:08	2:22	2:00	2:00	1:17	1:13	1:33	1:57	2:36
2008/09	1:30	1:22	1:23	1:35	1:32	1:23	1:32	1:19	1:06	1:15	1:10	1:23

COMMENTS:

- During the months of January and February, each agent attended an intensive 5 day training course which resulted in fewer staff on the phones and a slight increase in the call wait time during this time.

ATTACHMENT B-3ER

3rd Quarter 2010-11

Legend:



= On target or trending to target



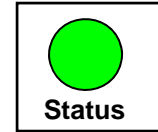
= Need to watch trend



= Senior management attention



CUSTOMER SERVICES AND SUPPORT DASHBOARD



STRATEGIC GOALS

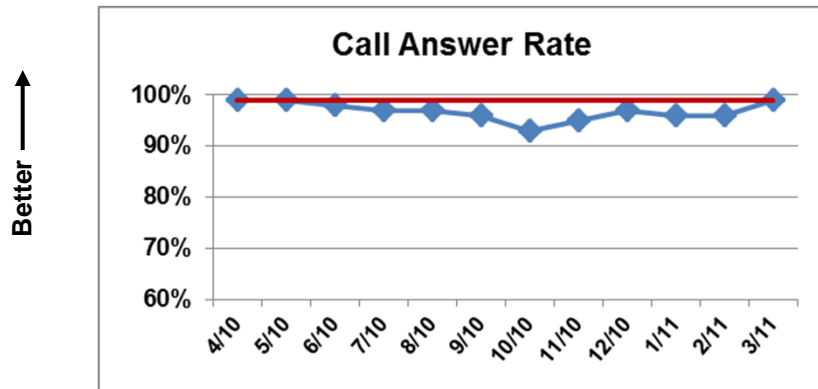
VI. Administer pension benefit services in a customer oriented and cost-effective manner.

MEASURE:

Percentage of telephone calls offered that are answered.

Call Answer Rate – *Employer Inquiries*

Target: Answer 98% of calls offered



Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2010/11	97%	97%	96%	93%	95%	97%	96%	96%	99%			
2009/10	99%	99%	98%	98%	97%	98%	98%	99%	99%	99%	99%	98%
2008/09	99%	99%	99%	99%	99%	99%	99%	99%	99%	99%	100%	99%

COMMENTS:

- During the months of January and February, each agent attended an intensive 5 day training course which resulted in fewer staff on the phones and a slight decrease in the answer rate.

ATTACHMENT B-4ER

3rd Quarter 2010-11

Legend:



= On target or trending to target



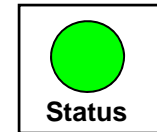
= Need to watch trend



= Senior management attention



CUSTOMER SERVICES AND SUPPORT DASHBOARD



STRATEGIC GOALS

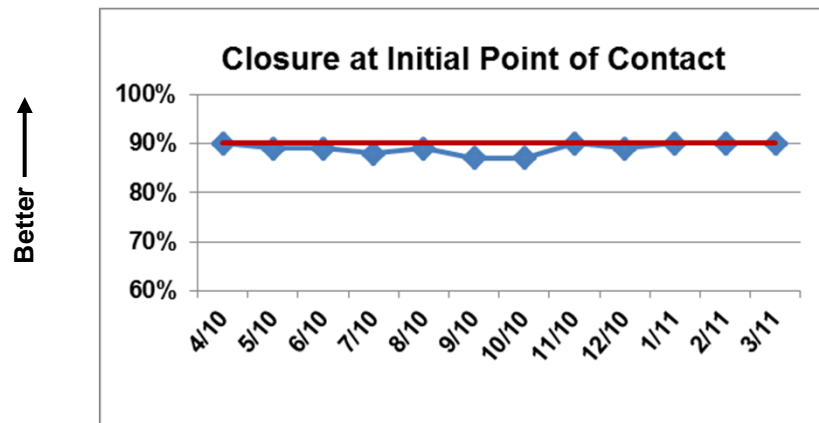
- II. Foster a work environment that values quality, respect, diversity, integrity, openness, communication and accountability.*
- III. Sustain a high performance work culture utilizing staff development, technology, and innovative leadership and management strategies.*

MEASURE:

Percent of telephone inquiries closed at initial point of contact.

Closure at Initial Point of Contact – Member Inquiries

Target: 90% effective Jan. 2009



Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2010/11	88%	89%	87%	87%	90%	89%	90%	90%	90%			
2009/10	91%	90%	89%	88%	90%	88%	89%	88%	89%	90%	89%	89%
2008/09	89%	90%	89%	88%	90%	89%	90%	90%	90%	90%	90%	90%

COMMENTS:

- This dashboard continues to be green.
- Staff continue to close more calls due to Quality Assurance improvements. Each agent is coached on 9 to 11 calls per month.
- Assessment testing begun in August 2010 has allowed trainers to identify areas of knowledge gaps. Training in these areas has been done resulting in increased call closures.

ATTACHMENT B-1

3rd Quarter 2010-11

Legend:



= On target or trending to target



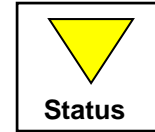
= Need to watch trend



= Senior management attention



CUSTOMER SERVICES AND SUPPORT DASHBOARD



STRATEGIC GOALS

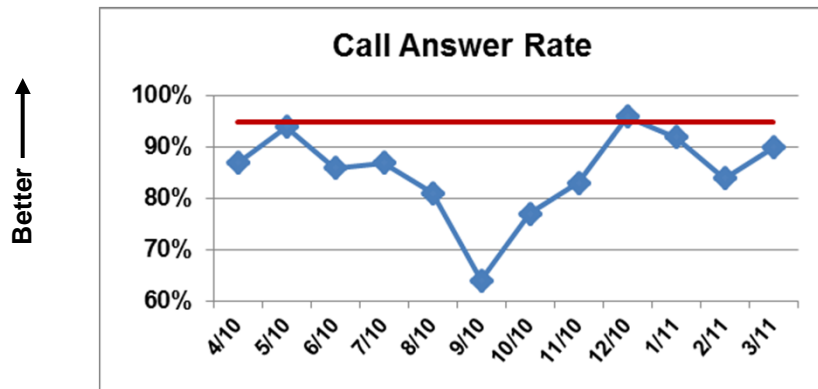
V. Provide sustainable pension benefit products and services responsive to and valued by members, employers and stakeholders.

MEASURE:

Answer before the caller abandons call, due to wait time.

Call Answer Rate – Member Inquiries

Target: Answer 95% of calls offered



Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2010/11	87%	81%	64%	77%	83%	96%	92%	84%	90%			
2009/10	96%	92%	89%	86%	86%	85%	84%	82%	84%	87%	94%	86%
2008/09	96%	95%	95%	93%	95%	94%	97%	94%	93%	94%	97%	97%

COMMENTS:

- This dashboard has changed from green to yellow.
- The trend of increasing call volumes continued into the third quarter with over 207,000 calls, an increase of 14,000 compared to 2009-10. Staff reported increased call volumes related to taxes and service credit purchases.
- Concerns over pension reform issues has triggered additional calls from active members and retirees.

ATTACHMENT B-2

3rd Quarter 2010-11

Legend:



= On target or trending to target



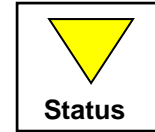
= Need to watch trend



= Senior management attention



CUSTOMER SERVICES AND SUPPORT DASHBOARD

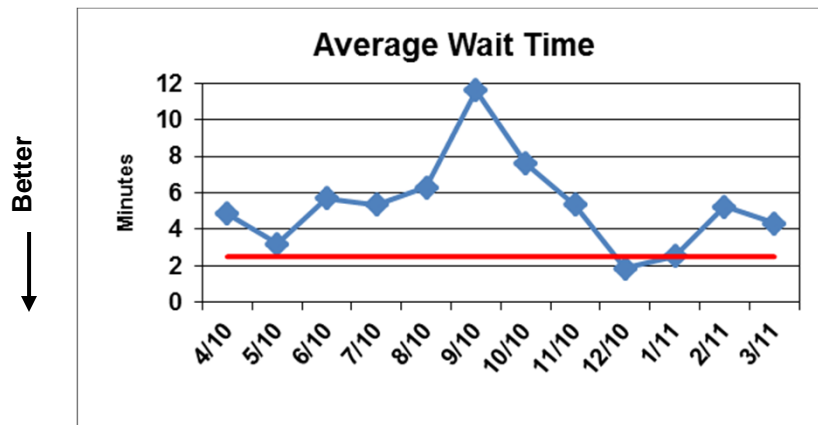


STRATEGIC GOALS

V. Provide sustainable pension benefit products and services responsive to and valued by members, employers and stakeholders.

MEASURE:

The length of time the callers wait for an agent after leaving the Interactive Voice Response (IVR) system and entering the queue.



Average Wait Time – Member Inquiries

Target: Answer calls within a monthly average of 2 minutes and 30 seconds

Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2010/11	5:21	6:18	11:37	7:37	5:20	1:52	2:32	5:15	4:19			
2009/10	1:33	3:12	3:59	4:58	4:13	4:25	5:09	6:01	6:14	4:51	3:12	5:42
2008/09	2:04	2:10	2:28	2:35	2:16	1:52	1:14	2:33	2:39	2:04	1:28	1:28

COMMENTS:

- This dashboard has changed from green to yellow.
- The trend of increasing call volumes continued into the third quarter with over 207,000 calls, an increase of 14,000 compared to 2009-10. Staff reported increased call volumes related to taxes and service credit purchases.
- Concerns over pension reform issues has triggered additional calls from active members and retirees.

ATTACHMENT B-3

3rd Quarter 2010-11

Legend:



= On target or trending to target



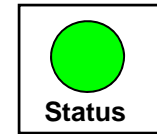
= Need to watch trend



= Senior management attention



CUSTOMER SERVICES AND SUPPORT DASHBOARD



STRATEGIC GOALS

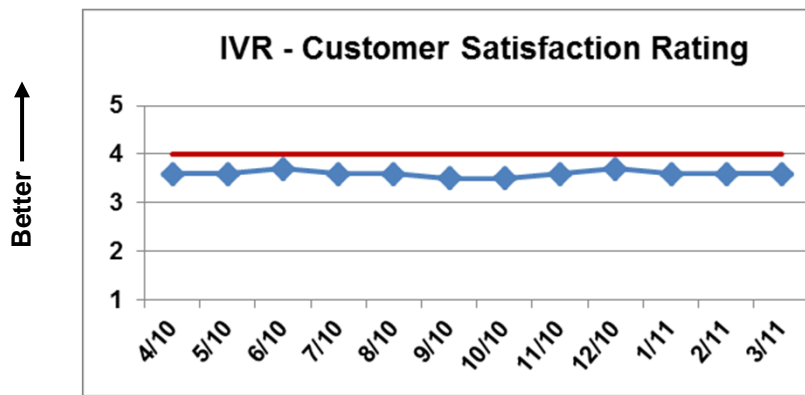
- V. Provide sustainable pension benefit products and services responsive to and valued by members, employers and stakeholders.*
- VI. Administer pension benefit services in a customer oriented and cost effective manner.*

MEASURE:

Overall customer satisfaction rating for the Interactive Voice Response (IVR) system.

IVR Customer Satisfaction Rating – Member Inquiries

Target: 4.0 (average)



Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2010/11	3.6	3.6	3.5	3.5	3.6	3.7	3.6	3.6	3.6			
2009/10	3.6	3.6	3.6	3.6	3.5	3.6	3.4	3.5	3.5	3.6	3.6	3.7
2008/09	3.2	3.3	3.2	3.3	3.6	3.5	3.6	3.5	3.6	3.5	3.5	3.6

COMMENTS:

- This dashboard continues to be green.
- Implementation of the IVR redesign has been scheduled to coincide with the launch of my|CalPERS. The vendor has begun programming, and we expect testing to begin in the 1st quarter of 2011-12.

ATTACHMENT B-4

3rd Quarter 2010-11

Legend:



= On target or trending to target



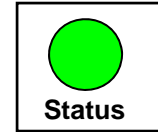
= Need to watch trend



= Senior management attention



CUSTOMER SERVICES AND SUPPORT DASHBOARD



STRATEGIC GOALS

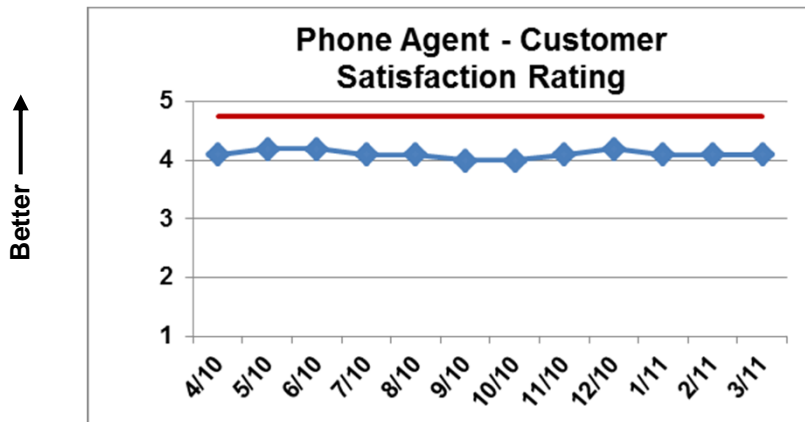
V. Provide sustainable pension benefit products and services responsive to and valued by members, employers and stakeholders.

MEASURE:

Customer satisfaction rating for phone agent services.

Phone Agent Customer Satisfaction Rating – Member Inquiries

Target: 4.7 (average)



Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2010/11	4.1	4.1	4.0	4.0	4.1	4.2	4.1	4.1	4.1			
2009/10	4.1	4.1	4.2	4.2	4.1	4.2	4.1	4.1	4.1	4.1	4.2	4.2
2008/09	4.3	4.4	4.3	4.3	4.2	4.2	4.1	4.1	4.2	4.1	4.2	4.2

COMMENTS:

- This dashboard continues to be green.
- Call center agents continue to earn high marks from customers for their politeness and professionalism.

ATTACHMENT B-5

3rd Quarter 2010-11

Legend:



= On target or trending to target



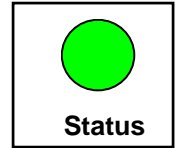
= Need to watch trend



= Senior management attention



CUSTOMER SERVICES AND SUPPORT DASHBOARD



Status

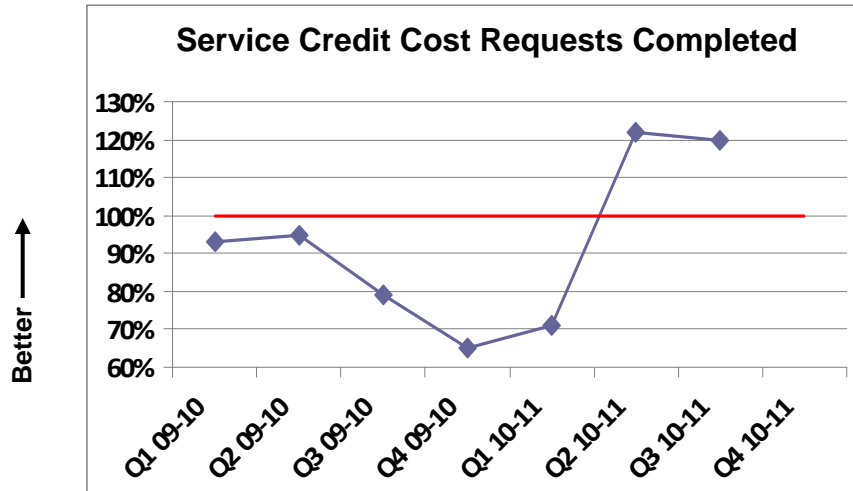
STRATEGIC GOALS

VI. Administer pension benefit services in a customer oriented and cost effective manner.

MEASURE:

Percent of service credit cost requests completed, compared to the number received.

Target: 100%



Year	Q1	Q2	Q3	Q4
2010-11	71%	122%	120%	
2009-10	93%	95%	79%	65%
2008-09	110%	118%	87%	79%

Service Credit Cost Inventory			
Type	Current: 0 to 90 Days	Backlog: Greater than 90 Days	Total
ARSC	2,533	1,015	3,548
Non-ARSC	2,497	1,682	4,179
Totals	5,030	2,697	7,727
% of Inventory	65%	35%	100%

COMMENTS:

- This dashboard exceeded the target for this quarter.

3rd Quarter 2010-11

Legend:



= On target or trending to target



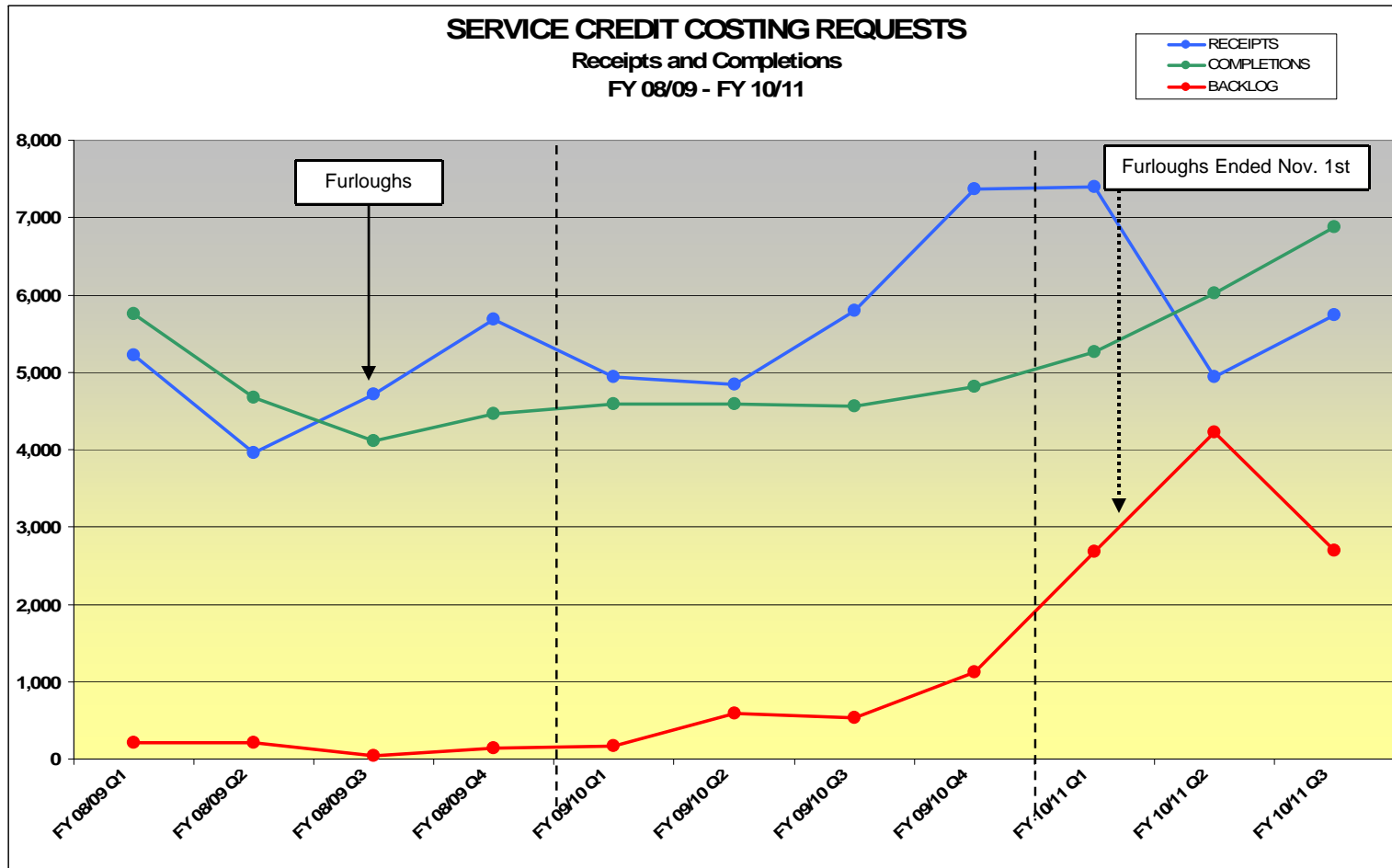
= Need to watch trend



= Senior management attention



CUSTOMER SERVICES AND SUPPORT DASHBOARD

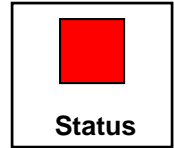


	FY 2008-09				FY 2009-10				FY 2010-11		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
RECEIPTS	5,221	3,952	4,717	5,678	4,946	4,849	5,803	7,369	7,396	4,941	5,737
COMPLETIONS	5,761	4,671	4,115	4,470	4,595	4,590	4,567	4,809	5,268	6,026	6,883
COMP/REC'VD %	110%	118%	87%	79%	93%	95%	79%	65%	71%	122%	120%
BACKLOG	212	205	40	135	168	596	528	1,129	2,681	4,225	2,697

3rd Quarter 2010-11



CUSTOMER SERVICES AND SUPPORT DASHBOARD



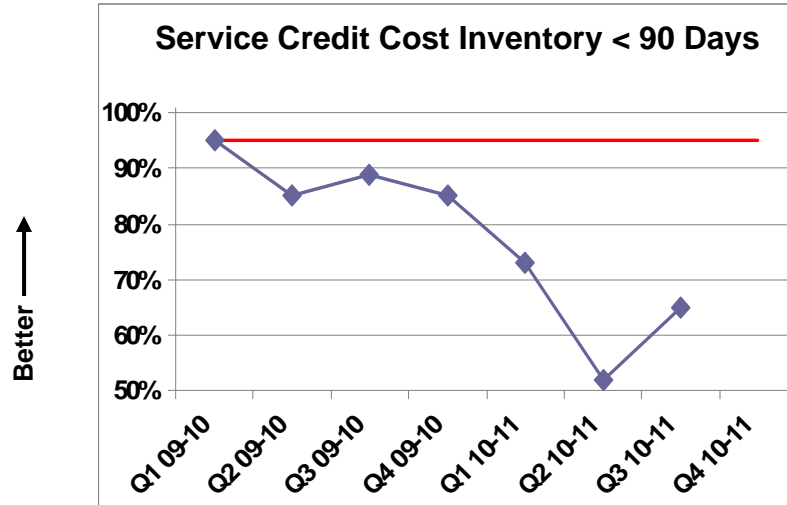
STRATEGIC GOALS

VI. Administer pension benefit services in a customer oriented and cost effective manner.

MEASURE:

Percent of service credit cost requests completed within 90 days of receipt.

Target: 95%



Year	Q1	Q2	Q3	Q4
2010-11	73%	52%	65%	
2009-10	95%	85%	89%	85%
2008-09	91%	88%	98%	96%

Service Credit Cost Inventory			
Type	Current: 0 to 90 Days	Backlog: Greater than 90 Days	Total
ARSC	2,533	1,015	3,548
Non-ARSC	2,497	1,682	4,179
Totals	5,030	2,697	7,727
% of Inventory	65%	35%	100%

COMMENTS:

The following factors have contributed to not meeting the goal:

- High receipts in September due to the implementation of new actuarial option factors
- Furloughs through October
- Fifteen staff in training during the quarter
- Legal settlement cases and constraint cases (cases pending due to matters outside of MBSD control)
- The deployment of Windows 7 reduced the availability of overtime during the quarter.

Mitigation Steps:

- Reprioritization of workload, redirection of Division staff, additional part-time staff have been hired, and overtime will continue.

3rd Quarter 2010-11

Legend:



= On target or trending to target



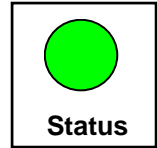
= Need to watch trend



= Senior management attention



CUSTOMER SERVICES AND SUPPORT DASHBOARD



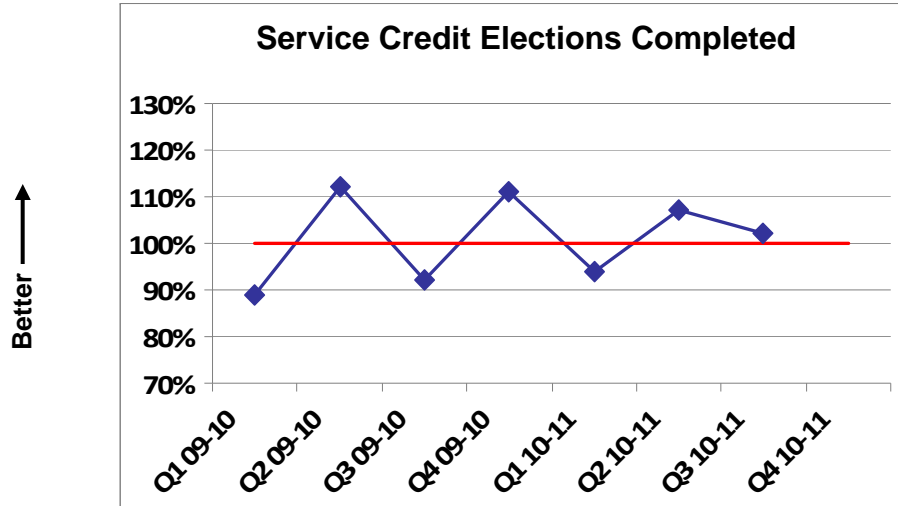
STRATEGIC GOALS

VI. Administer pension benefit services in a customer oriented and cost effective manner.

MEASURE:

Percent of service credit elections completed, compared to the number received.

Target: 100%



Year	Q1	Q2	Q3	Q4
2010-11	94%	107%	102%	
2009-10	89%	112%	92%	111%
2008-09	79%	127%	104%	101%

Service Credit Elections Inventory			
Age	Current: 0 to 30 Days	Backlog: Greater than 30 Days	Total
Number	95	22	117
% of Inventory	81%	19%	100%

COMMENTS:

- This dashboard continues to be green.

3rd Quarter 2010-11

Legend:



= On target or trending to target



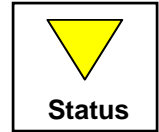
= Need to watch trend



= Senior management attention



CUSTOMER SERVICES AND SUPPORT DASHBOARD



STRATEGIC GOALS

VI. Administer pension benefit services in a customer oriented and cost effective manner.

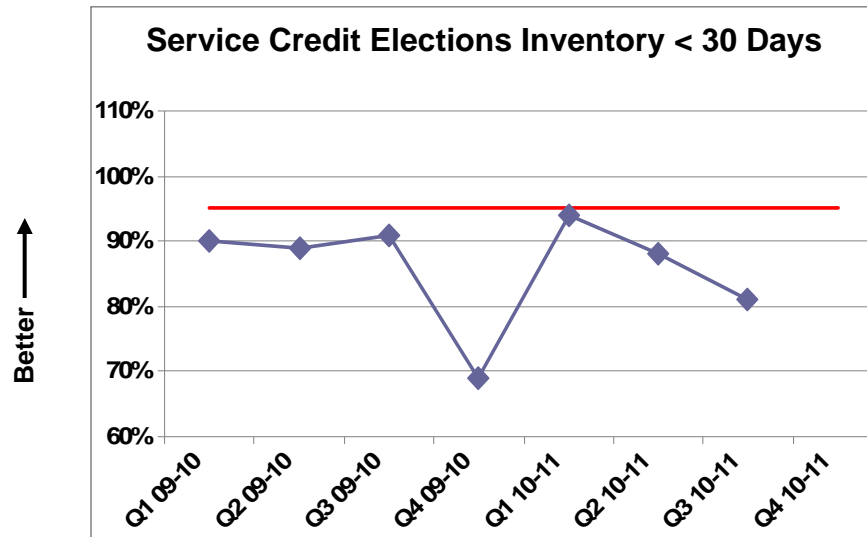
MEASURE:

Percent of service credit elections processed within 30 days of receipt.

Target: 95% effective July 2007

Year	Q1	Q2	Q3	Q4
2010-11	94%	88%	81%	
2009-10	90%	89%	91%	69%
2008-09	77%	97%	98%	92%

Service Credit Elections Inventory			
Age	Current: 0 to 30 Days	Backlog: Greater than 30 Days	Total
Number	95	22	117
% of Inventory	81%	19%	100%



COMMENTS:

- Currently this dashboard is below target due primarily to constraint cases, for which we are waiting for additional information from the member or the member's financial institution in order to complete the election transaction.
- The number of items greater than 30 days old is generally consistent throughout the year due to constraint cases. The low total inventory inflates the percent of items greater than 30 days old resulting in a lower percentage of items meeting the target.

Mitigation Steps:

- We will continue working with financial institutions and members to obtain the required documents to complete these constraint cases.

3rd Quarter 2010-11

Legend:



= On target or trending to target



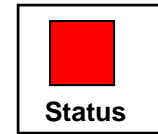
= Need to watch trend



= Senior management attention



CUSTOMER SERVICES AND SUPPORT DASHBOARD



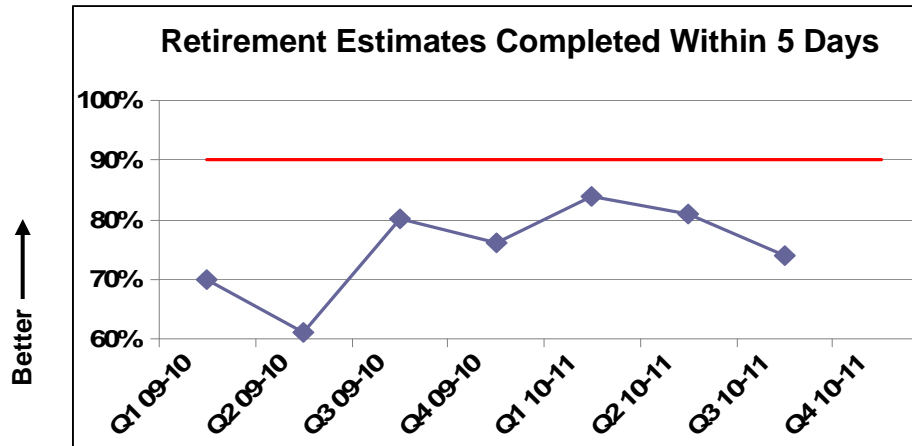
STRATEGIC GOALS

VI. Administer pension benefit services in a customer oriented and cost effective manner.

MEASURE:

Percent of workable estimates completed within 5 days of receipt.

Target: 90%



Estimates Completed Within 5 Days				
Year	Q1	Q2	Q3	Q4
2010-11	84%	81%	74%	
2009-10	70%	61%	80%	76%
2008-09	85%	74%	81%	77%

COMMENTS:

- The number of retirement estimates requested and completed increased significantly this quarter.
- The 5-day completion rate decreased due to the large volume of estimate requests. Additionally, the migration to Windows 7 caused some unexpected glitches in retrieving estimates in the system impacting this 5-day metric.
- No backlog exists.

Mitigation Steps

- Requests for estimates are currently being prioritized in order of retirement date requested.

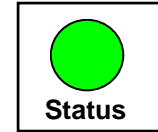
3rd Quarter 2010-11

Legend: ● = On target or trending to target ▼ = Need to watch trend ■ = Senior management attention

ATTACHMENT B-10



CUSTOMER SERVICES AND SUPPORT DASHBOARD



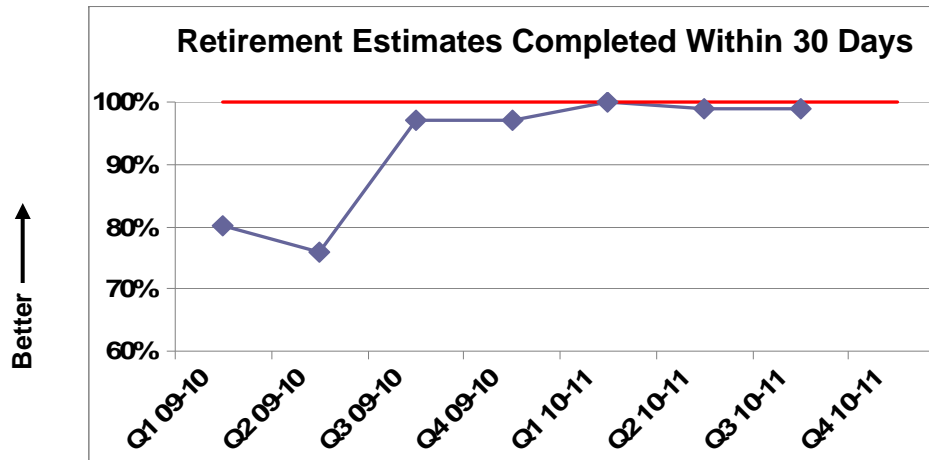
STRATEGIC GOALS

VI. Administer pension benefit services in a customer oriented and cost effective manner.

MEASURE:

Percent of workable estimates completed within 30 days of receipt.

Target: 100%



Estimates Completed Within 30 Days				
Year	Q1	Q2	Q3	Q4
2010-11	100%	99%	99%	
2009-10	80%	76%	97%	97%
2008-09	93%	93%	94%	87%

Estimates Backlog: Greater than 30 Days				
Year	Q1	Q2	Q3	Q4
2010-11	0	0	0	
2009-10	2,557	452	0	0
2008-09	617	245	298	2,074

COMMENTS:

- This metric is on target. The number of retirement estimates requested and completed increased significantly this quarter.
- No backlog exists.
- The fallout rate representing the percentage of estimates needing manual calculations remains high at 38%.

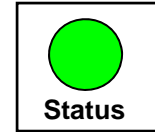
3rd Quarter 2010-11

Legend: = On target or trending to target = Need to watch trend = Senior management attention

ATTACHMENT B-11



CUSTOMER SERVICES AND SUPPORT DASHBOARD



STRATEGIC GOALS

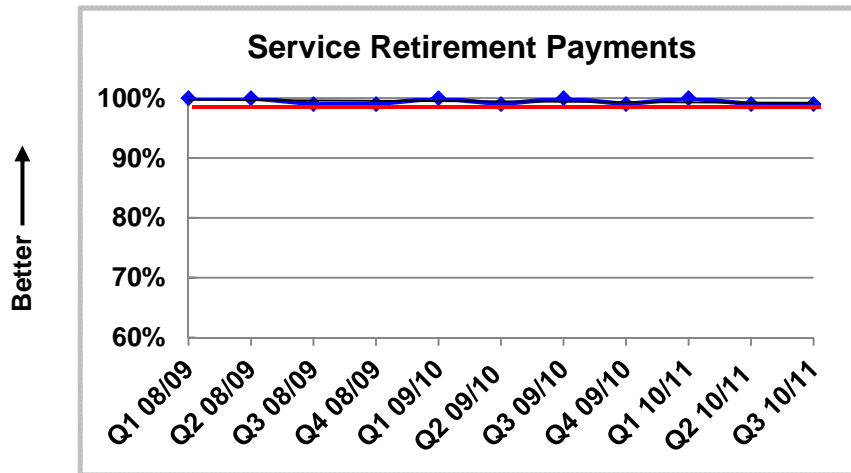
- V. Provide sustainable pension benefit products and services responsive to and valued by members, employees and stakeholders.*
- VI. Administer pension benefit services in a customer oriented and cost effective manner.*

MEASURE:

Percent of applicants whose first payment is made within 30 calendar days of retirement effective date or application.

Service Retirement Payments

Target: 100%



Year	Q1	Q2	Q3	Q4
2010-11	100%	99%	99%	
2009-10	100%	99%	100%	99%
2008-09	100%	100%	99%	99%

COMMENTS:

- Service retirement payments represent the highest priority workload for this Section and every effort is made to ensure members receive their first payment with no gap from their last employment paycheck.

3rd Quarter 2010-11

Legend:



= On target or trending to target



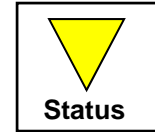
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= Senior management attention



CUSTOMER SERVICES AND SUPPORT DASHBOARD



STRATEGIC GOALS

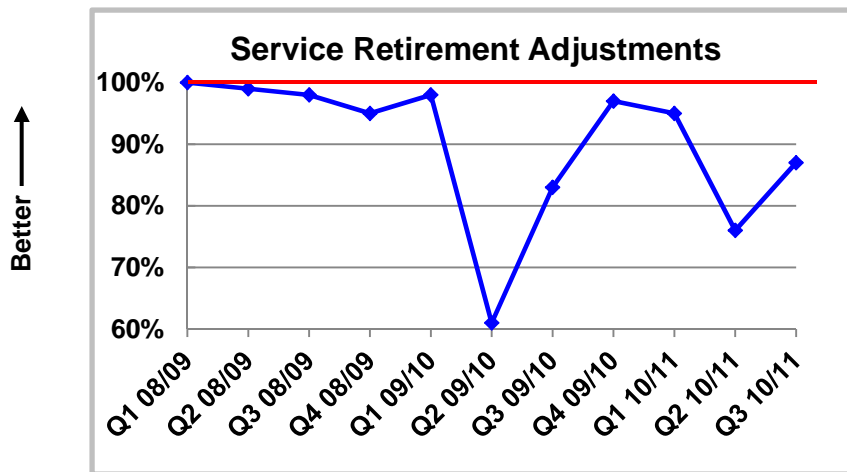
- V. Provide sustainable pension benefit products and services responsive to and valued by members, employees and stakeholders.*
- VI. Administer pension benefit services in a customer oriented and cost effective manner.*

MEASURE:

Percent of final adjustments made to service retirement benefits within 9 months of the retirement effective date.

Service Retirement Adjustments

Target: 100%



Year	Q1	Q2	Q3	Q4
2010-11	95%	76%	87%	
2009-10	98%	61%	83%	97%
2008-09	99%	99%	98%	95%

COMMENTS:

- Service retirement adjustments are dependent upon final payroll reporting from employers and performance varies accordingly.
- Unprecedented increases in incoming service retirement applications and associated payments in prior quarters continue to impact our service level for adjustments.

3rd Quarter 2010-11

Legend:



= On target or trending to target



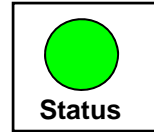
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CUSTOMER SERVICES AND SUPPORT DASHBOARD



STRATEGIC GOALS

V. Provide sustainable pension benefit products and services responsive to and valued by members, employees and stakeholders.

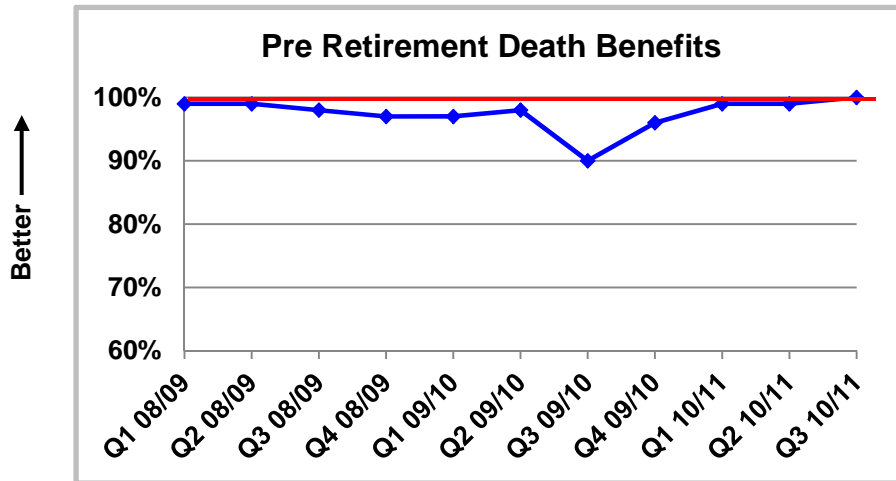
VI. Administer pension benefit services in a customer oriented and cost effective manner.

MEASURE:

Percentage of death benefit claims paid within 45 days of receipt of last required documentation. (Pre-retirement)

Pre-Retirement Death Benefit Payments

Target: 100%



Year	Q1	Q2	Q3	Q4
2010-11	99%	99%	100%	
2009-10	97%	98%	90%	96%
2008-09	99%	99%	98%	97%

COMMENTS:

- Pre-retirement death benefits performance met the target.

3rd Quarter 2010-11

Legend:



= On target or trending to target



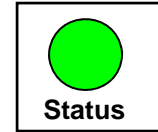
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CUSTOMER SERVICES AND SUPPORT DASHBOARD



STRATEGIC GOALS

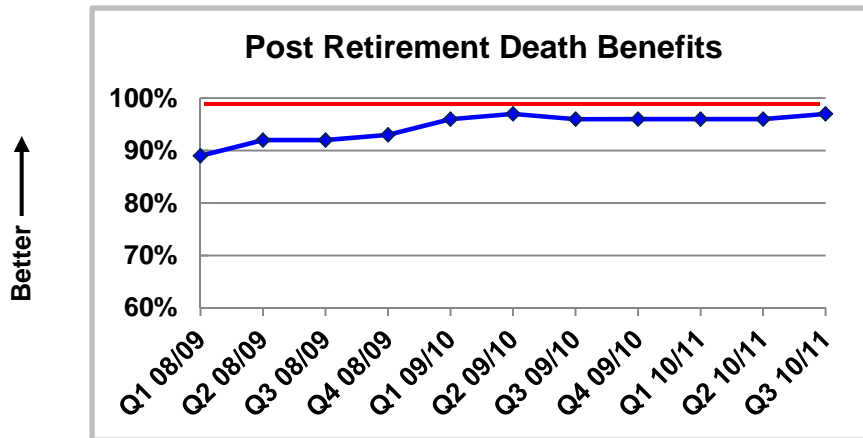
- V. Provide sustainable pension benefit products and services responsive to and valued by members, employees and stakeholders.*
- VI. Administer pension benefit services in a customer oriented and cost effective manner.*

MEASURE:

Percentage of death benefit claims paid within 45 days of receipt of last required documentation. (Post-retirement)

Post-Retirement Death Benefits

Target: 100%



Year	Q1	Q2	Q3	Q4
2010-11	96%	96%	97%	
2009-10	96%	97%	96%	96%
2008-09	89%	92%	92%	93%

COMMENTS:

- Post retirement death benefits utilized experienced, temporary staff and overtime on this workload. We will continue to focus efforts on this high priority workload.

3rd Quarter 2010-11

Legend:



= On target or trending to target



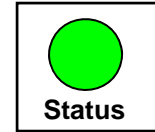
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CUSTOMER SERVICES AND SUPPORT DASHBOARD



STRATEGIC GOALS

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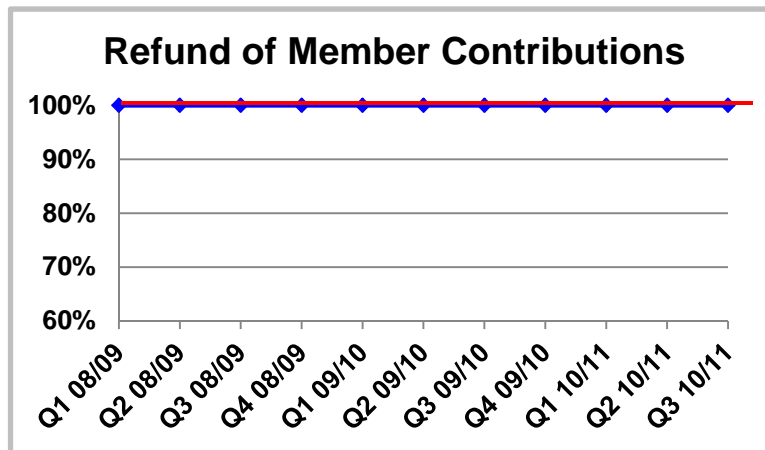
VI. Administer pension benefit services in a customer oriented and cost effective manner.

MEASURE:

Percentage of first refunds paid to eligible members within 30 calendar days of receipt of a valid election form.

Refund Payments

Target: 100%



Year	Q1	Q2	Q3	Q4
2010-11	100%	100%		
2009-10	100%	100%	100%	100%
2008-09	100%	100%	100%	100%

COMMENTS:

- Performance in refunds consistently reaches the target.

3rd Quarter 2010-11

Legend:



= On target or trending to target



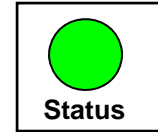
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CUSTOMER SERVICES AND SUPPORT DASHBOARD



STRATEGIC GOALS

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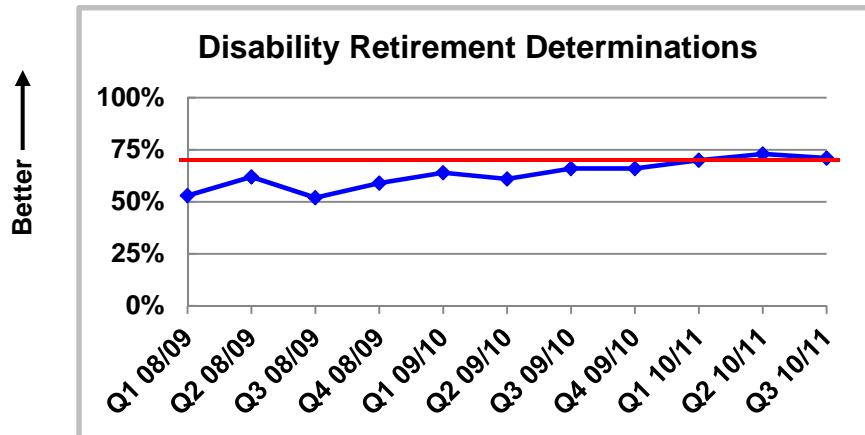
VI. Administer pension benefit services in a customer oriented and cost effective manner.

MEASURE:

Percent of disability determinations made regarding approval or disapproval within 6 months of receipt of complete application packages.

Disability Determinations

Target: 70%



Year	Q1	Q2	Q3	Q4
2010-11	70%	73%	71%	
2009-10	64%	61%	66%	66%
2008-09	53%	62%	52%	59%

COMMENTS:

- The 70 percent target takes into consideration the additional time required to obtain additional medical documentation from workers' compensation carriers and the members' treating medical specialist(s). In addition, members may be scheduled to attend an Independent Medical Examination(s). These factors can cause the disability determination to extend beyond the six month target.
- 89 percent of workable cases are within the 6-month timeframe or below.

3rd Quarter 2010-11

Legend:



= On target or trending to target



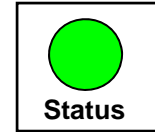
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CUSTOMER SERVICES AND SUPPORT DASHBOARD



STRATEGIC GOALS

V. Provide sustainable pension benefit products and services responsive to and valued by members, employees and stakeholders.

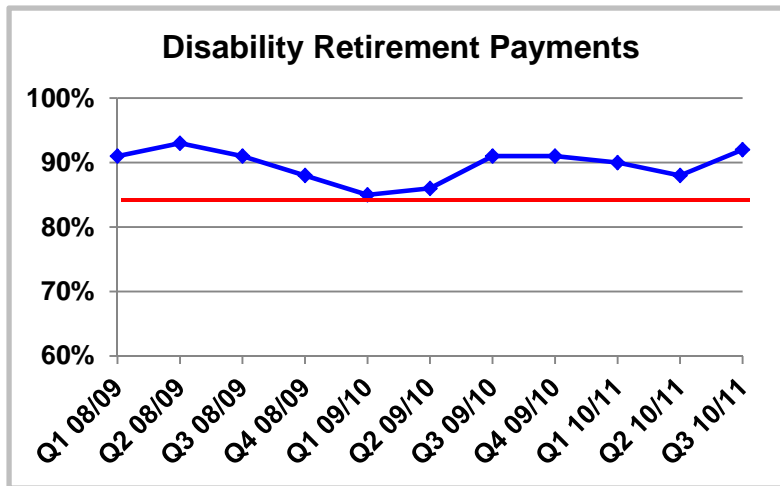
VI. Administer pension benefit services in a customer oriented and cost effective manner.

MEASURE:

Percent of first disability payments made within 30 days of effective date or approval.

Disability Payments

Target: 85%



Year	Q1	Q2	Q3	Q4
2010-11	90%	88%	92%	
2009-10	85%	86%	91%	91%
2008-09	91%	93%	91%	88%

COMMENTS:

- Disability retirement payments represent the highest priority workload for this Section and every effort is made to ensure members receive their first payment with no gap from the date of their last employment paycheck or from the date they were approved.

3rd Quarter 2010-11

Legend:



= On target or trending to target



= Need to watch trend



= Senior management attention